

ADVANCING DEMOCRACY AND CHANGE MANAGEMENT IN MEXICO

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QUARTERLY REPORT

Covering

April 1, 2005 – June 30, 2005

Partners for Democratic Change

I. OVERVIEW

This is the third quarterly report for the “Advancing Democracy and Change Management” program in Mexico. It covers three months of activity since the last submission of the quarterly report on April 30, 2005. Please note that our previous reports covered an extra month’s worth of activities; in this report, we will return to the standard reporting schedule.

This period has involved the initiation of programmatic work and the completion of many start-up activities designed to establish and strengthen the new Partners’ Center for Change Management (CCC) in Mexico City. In our preliminary implementation plan, Partners noted that by June 30th, we would:

- Hire additional staff for the Center;
- Register and establish the tax exempt status of the organization;
- Further develop the Center’s financial, management and reporting systems;
- Continue outreach and assessment of needs in Mexico City;
- Train Center staff in Partners’ methodologies;
- Adapt and translate training materials;
- Initiate programmatic activities, including a city-wide meeting/training in Mexico City and trainings for civil society and Mexico City delegations.

All of these activities have been completed or are in the process of being implemented. Below is a summary of activities and progress toward meeting our stated objectives in the past quarter and highlights of initiatives to be carried out in the next quarter.

During this quarter, Partners has continued to provide assistance to CCC in staffing, financial, fundraising, management and programmatic skills development. San Francisco-based staff has visited the Center three times. In April, a Program Manager from Partners for Democratic Change assisted CCC in the hire of two additional staff positions. Following these hires, PDC President and a Program Manager visited Mexico City to collaborate on workplan implementation, board development, fundraising, staff capacity-building and other issues. Partners has also provided assistance in staff capacity building and has collaborated

closely with the Directors of Partners-Argentina and CCC to develop a training plan for CCC and affiliated contacts in cooperative processes, consensus building, mediation, negotiation and facilitation.

II. PROGRESS IN MEETING OBJECTIVES

A. ESTABLISHING A CENTER STRUCTURE

During the past quarter, Partners completed the following activities in order to establish the Center:

- **Register the Center as a Mexican NGO:** In March 2005, the Center was temporarily registered under the name of Socios-México Centro de Colaboración Cívica, A.C. (CCC); the end of this quarter resulted in the permanent registration of the Center at Registro Público de la Propiedad.
- **Register the Center as Tax Exempt:** Immediately following the formal registration of the Center, the required documentation was sent to Instituto Nacional de Desarrollo Social (INDESOL) in order to generate a letter necessary for the Secretaría de Hacienda to secure the Center's tax exempt status. The status is expected to be acquired during the next quarter.
- **Secure and Equip a Permanent Office for the Center:** In April, a permanent office location was secured and occupied; laptops and basic office equipment have been purchased, and the office is now fully equipped. The office space has the capacity to offer trainings for 10-15 people.
- **Hire Additional Staff for the Center:** During the week of April 4th, a Partners' Program Manager traveled to Mexico City to assist the Director, Susana Vidales, in the hiring of two additional staff positions. Over 37 applications were processed and 20 candidates were interviewed for both positions. Two candidates were identified during this interview process, and the CVs of these candidates were submitted for USAID approval on April 26th. Two new staff members – a Senior Trainer (Georgina Rangel) and Executive Coordinator (Alejandra Solorzano) – began employment (hired for an initial three-month probationary period) with CCC in the beginning of May following the approval of USAID.
- **Select Additional Board Members and Hold the First Official Board Meeting:** The second board meeting was held on June 27; Gastón Luken, Luis Rubio, Susana Vidales and Raymond Shonholtz were present at the meeting (Luis Gómez was absent). The agenda included:
 - (1) A report on activities developed since the previous Board meeting;
 - (2) A review of the workplan for the remaining months of Year I, including discussion of upcoming trainings and cooperative planning activities for civil society and municipal government;

- (3) Several names of potential new Board members were proposed and the Board decided to proceed with the process of inviting them to the next Board meeting to be held at the beginning of September.

The next board meeting is planned for September 6th. During this meeting, additional candidates for Board membership will be presented to the current Board.

B. DEVELOPING CENTER SKILLS

- **Staff training in Partners' methodologies:** The first formal training for the Center staff (participants of the training included staff and strategic contacts that the Center is further cultivating, including university representatives and professional mediators) took place the week of May 16 and was conducted by the Director of Partners-Argentina, Graciela Tapia. This training included an overview of diverse methodologies for conflict and change management, and basic training in communication, negotiation and mediation – the building blocks of more complex collaborative processes. Participants during this training were additionally exposed to practical examples of how these processes have been adapted and used in Argentina. The second formal staff training will take place July 14th-July 16th and will include staff from CCC and external contacts who had attended the first training (and will collaborate with the Center in conducting future trainings/facilitations). This training, which will be conducted by the Director and a trainer from Partners-Argentina, will focus on more advanced skills of facilitation, collaborative processes and consensus building. Partners continues to work with Ms. Vidales to adapt the timeline for staff capacity-building, and is currently developing an applied training model whereby initial trainings/facilitations that the Center engages in are co-conducted with a senior and more junior trainer/facilitator.
- **Materials development:** CCC has developed informational materials and brochures about its mission and services, and has disseminated them to potential clients and partners during outreach endeavors. It has additionally adapted manuals from Partners-Argentina, including “Tools for Community Development,” the “Manual para Organizaciones Sociales/Mediación y Resolución de Conflictos,” and “Manual Construcción de Consenso: los Procesos Colaborativos.” CCC has also produced a 12-page binder with a presentation on the Center, PDCI, biographies of Center staff and descriptions of the various methodologies that CCC uses.
- **Center sustainability:** San Francisco-based staff continues to make regular visits to Mexico to work with the staff to further develop programmatic, organizational, reporting and financial systems and to ensure that the Mexico Center staff has adequate financial management skills. Three visits took place in this quarter. In April, a Program Manager visited CCC to assist in the hiring of the two new staff members. In June, two additional visits took place – one by the PDC President and one by a Program Manager. The PDC President focused on Board recruitment, fundraising and management issues. The Program Manager worked with the Director on workplan strategy and implementation (Years I and II), management, administrative and financial issues.

The Director of CCC was originally planning to attend her first Partners for Democratic Change International meeting in June, but it was decided that with the enormous amount of start-up activity occurring (including the orientation of CCC's new staff), it would be more advantageous for Susana to attend the next PDCI meeting in November.

- **Co-Funding:** In the past several months, Partners' President, the Center Director and the Mexico Board of Directors have continued to conduct outreach to the private sector in Mexico to secure their participation in, and financial support of, the Center's activities. In addition to the initial co-funding for the program from Kimberly Clark – Mexico, the GE Foundation and commitments from Daimler Chrysler, Partners has also received a second year of co-funding from the GE Foundation. Several other corporate partners are currently considering funding proposals, and are awaiting the Center's tax exempt status to formally commit funds.
- **Outreach:** As a result of the extensive outreach that the Center Director conducted in the previous quarter, CCC was invited to speak at a forum in May entitled, "La mediación y otros sistemas de Justicia Alternativa con Aplicaciones en Seguridad Pública," organized by the Federal Public Security Office (Secretaría de Seguridad Pública Federal), along with the Mediation Centers from the states of Puebla and Queretaro, the Centro Interdisciplinario para Manejo de Conflictos, the Centro Mexicano de Mediación and UNICEF. The objective of the forum was to promote mediation as an alternative instrument for conflict resolution in the public sector. CCC prepared a paper entitled, "Obstacles and Limitations for Mediation in Mexico," and discussed the challenges of integrating mediation and negotiation into Mexican social and legislative culture, and opportunities for its practical usage.

As a result of CCC's attendance at the workshop "Mediación: Propiedad Intelectual y otras Disciplinas," organized by the International Chamber of Commerce on April 20th, CCC was invited to a breakfast on June 16th of a large group of corporations from the media sector. This was a particularly advantageous opportunity to present CCC to this influential group, and as a result, many participants were exposed to and interested in future collaborations with CCC. In particular, Mr. Arturo Ancona, senior consultant from the World Intellectual Property Organization based in Geneva, wanted to further explore points of collaboration, particularly around issues of counterfeiting and piracy and its effects on the creative community; this discussion is ongoing.

Additional outreach has included meetings and discussions with Carlos Ortiz Mena from Appleseed Foundation, Edmundo Vallejo from the GE Foundation, Arturo Rodríguez Tonelli of the European Union Delegation in Mexico and Drs. Jorge Saavedra and Carlos Magis of the HIV/AIDS Prevention and Control (CENSIDA).

C. DEVELOPING CENTER PROGRAMS

- **Assessment, Outreach and Program Design**

As outlined in the workplan, CCC will, in collaboration with the Center Director and a trainer from Partners-Argentina, conduct an educational/training event for potential CCC clients on July 13th- 14th. This event will educate participants in Partners' methodologies, and will showcase a variety of advanced change management processes that can address some of the concrete and pressing challenges faced by these individuals, organizations, universities, corporations and political Delegaciones. Individuals have been invited from civil society, USAID, Mexican local and state government (Magdalena Contreras Delegación and Zacatecas state government officials), the private sector and academic institutions. The goal of this training is to market the Center's expertise and the application of these methodologies in contemporary political context. As CCC has determined this meeting as well as other outreach strategies to be more effective in generating interest and opportunities for the Center, this will take the place of the open house identified in the workplan.

- **Trainings for Civil Society Organizations**

On June 23rd and 24th, CCC co-conducted a training with SERAPAZ, an NGO specializing in peace services and consulting (and established by former advisors and members of CONAI – the National Mediation Commission – dissolved in 1998). Georgina Rangel conducted this training in collaboration with SERAPAZ representatives, focusing her portion of the training on conflict analysis and negotiation. Sixteen people attended this training, primarily from youth organizations.

During this quarter, CCC has designed a proposal and an agreement for a mediation training for Agrupacion De Derechos Humanos Xochitepetl, A.C. This training will target a group of 10-15 people from civil and social organizations that provide legal services to communities in rural and indigenous areas of the states of Veracruz, Guerrero, Oaxaca and Chiapas. This training program is divided into two stages, and the first will take place August 19-21.

- **Trainings for Local Government**

Over this past quarter, CCC has cultivated a relationship with the Delegación of Magdalena Contreras. Representatives of the Delegación will attend the educational/training event (summarized above) in July which will further demonstrate to the representatives the practical usages for the expertise, resources and services that CCC offers. CCC is currently designing a proposal to submit to the Delegación to conduct a training-for-trainers for a select group of Delegación officials and neighborhood representatives responsible for involving civil society in the design and implementation of the Delegación's programs and future plans. This training will take place in August/September (dates still to be finalized) and will train 20 people elected by the Delegación, who will then train the remaining 450 representatives from civil society in effective communication, meeting facilitation and negotiation. The objective of these trainings is both to build the skill set of these 450 representatives and to identify issues around which CCC would conduct its pilot local cooperative planning program.

CCC has additionally had several meetings with the Red de Mujeres Municipales, A.C. and is currently designing a proposal to train women mayors, council women and women legislators of the state of Oaxaca to better prevent and manage conflict. This training will take place August 4th-6th and will focus on conflict analysis, effective communication, negotiation and meeting facilitation. This will be the first in a possible series of trainings that would take place in Veracruz, Jalsco, Colima and Chiapas.

- **National Dialogues**

CCC has been working to identify an area of public policy interest that could benefit from inter-sectoral dialogues, and is currently in the process of designing a proposal for a cooperative planning process engaging international textile corporations, their contractors in Mexico (maquiladores), labor unions and NGOs to discuss and come to an agreement on the use and application of ethical codes by contractors. After several meetings over this past quarter, the President of MUTUAC (Mujeres Trabajadoras Unidas, A.C.) agreed to CCC formally presenting the project to the Levi Strauss Foundation. The first stage of this cooperative process would involve an assessment and identification of stakeholders involved (preliminary participants will include the Levi Strauss Corporation, Levis' contractors, Union representatives and NGO representatives) and following that, conducting the cooperative process and implementing and monitoring the agreement. Through CCC's outreach, many other contacts have expressed interest in participating in this project, including the AFL-CIO. This cooperative process will comprise one of the national dialogues, as the issue of collaboration between international corporations, maquiladores, unions and NGOs working on the textile export industry is of national relevance.

- **Additional Opportunities**

Over this past quarter, CCC has cultivated opportunities with Laura Carrera, advisor to the Governor of the state of Zacatecas, to develop projects (both training and facilitative) with the state government of Zacatecas. While still in the brainstorming stages, the emphasis of this project would be on developing more stable and effective relationships between the state government and the public institutions. In addition, the state of Zacatecas is interested in the public sector's ability and capacity to develop, implement and evaluate state policies and programs, and the need to build the skills of government representatives to integrate participatory decision-making into their work. This program will open doors for other USAID partners to work in Zacatecas.

- **Multi-Party Mediation Services**

Over the course of the last six months, CCC has actively recruited external contacts to participate in the trainings conducted by Partners-Argentina, and has cultivated these relationships over time. To further strengthen their skill sets, these external contacts will be utilized in many of the Center's upcoming programmatic opportunities in order for them to apply these skills in varying contexts.

III. ACTIVITIES FOR THE NEXT QUARTER

During the next quarter:

- Center staff and external contacts will continue to be trained in change and conflict management methodologies, and will have the opportunity to practice these skills through applied training models.
- The Center will achieve its tax exempt status.
- The core Board and the Director will work together to recruit additional Board members representing diverse sectors in Mexico; potential candidates will be presented at the next Board meeting to take place in September.
- The Center will conduct a meeting/training for representatives of the private sector, civil society and local government from July 13-14 on CCC's methodologies and practical usage in contemporary Mexico.
- The Center will submit formal proposals to Magdalena Contreras (training for Delegación and civil society representatives), Red Mujeres Municipales (training for women politicians), MUTUAC (national dialogues) and the state of Zacatecas (training and facilitation of collaborative processes).
- The Center will conduct trainings for Delegación Magdalena Contreras, Agrupación De Derechos Humanos Xochitepetl and Red Mujeres Municipales.
- The Center will further establish partnerships with representatives of universities to develop strategies for mainstreaming methodologies into university courses.